



Strategic Planning for Public Libraries

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About Joy

- ▶ 10+ years of consulting and strategic planning
- ▶ Experience includes higher education, non-profits, libraries, and tech
- ▶ Graduate of Harvard and Wake Forest
- ▶ In my “day job”, I’m a Googler working in strategy and operation



By the end of
this session, you
will...

- ▶ Understand the framework and approach outlined in *Strategic Planning for Public Libraries*
- ▶ Be able to navigate the book for various use cases
- ▶ Have the tools to conduct a community assessment

Framework and Approach

What are the two most common barriers to strategic planning?



Top 6 learning areas for PLA members:

- Engaging the community
- Measuring progress against the plan
- Reaching non-users
- Creating a living document that can be continually updated
- Conducting a community assessment
- Getting staff participation



More than 50% of survey respondents would prefer to **spend no more than 3 months** on the strategic planning process

There are four key phases in the strategic planning framework

1. Prepare for Strategic Planning

2. Conduct Community Assessment

3. Develop Strategic Plan Content

4. Implement and Measure Progress

1. Prepare for Strategic Planning



Action Items:

- Define governance and approval process
- Select and organize the core planning team
- Evaluate the need for external support
- Develop a project plan and timeline
- Identify key internal and external stakeholders
- Prepare a communications plan



Templates and Worksheets:

- Make the case to the board
- Form the strategic planning team
- Consultant evaluation form
- Project plan

2. Conduct Community Assessment



Action Items:

- Determine data needed for assessment
- Identify existing data sources
- Gather and analyze existing data
- Identify options for collecting primary data
- Design an approach for gathering primary data
- Gather and analyze primary data



Templates and Worksheets:

- Data collection plan
- Data sources checklist
- *Project Outcome* survey best practices
- *Libraries Transforming Communities* community conversation questions

3. Develop Strategic Plan Content



Action Items:

- Align community assessment with internal capabilities
- Craft mission, vision, and values statements
- Identify strategic priorities and goals
- Create a one-page plan



Templates and Worksheets:

- Strengths and impact matrix
- Brainstorming guides
- First draft guides
- Real-world examples from several libraries

4. Implement and Measure Progress



Action Items:

- Create SMART objectives
- Develop an action plan
- Measure the success of initiatives
- Manage and communicate change
- Integrate continuous improvement



Templates and Worksheets:

- Identify SMART objectives
- Action plan

Features to help you get the most from *Strategic Planning for Public Libraries*

1. Color-coded chapters for ease of navigation
2. Downloadable supplement chock full of editable worksheets and templates
3. Recent, real-life examples from a diverse group of libraries
4. Clear references to supplement in print- and e-book to facilitate cross-referencing reference and navigation
5. Sidebars highlighting key topic areas
6. Glossary of terms



Making this book work for you...

Case #1

Scenario: Your strategic planning process is underway, yet you need a communications plan template.

Solution: Download editable templates and worksheets and check out some examples while you're at it.

Case #2

Scenario: You are leading strategic planning for the first time and would like to prepare in advance.

Solution: Read the book cover-to-cover first to familiarize yourself with the process. Then follow the end-to-end process of the book, leveraging the supplemental materials.

Case #3

Scenario: You are a strategic planning veteran looking to try some new approaches and ideas.

Solution: Review the content of interest, paying particular attention to the overview for each chapter and sidebar content.

Conduct Community Assessment

2. Conduct Community Assessment

1 Determine Data Needs

- Ask thoughtful questions, for example:
 - Who is in the community served by the library?
 - Who is not served or underserved by the library?
 - In what ways is the community growing and changing?
 - What are the wants and aspirations of the community?
- Link questions to data sources

2 Collect and Analyze Existing Data

- Identify existing data sources
- Compile and organize data
- Utilize tools to organize data that is collected

2. Conduct Community Assessment

3 Design Primary Data Collection Approach

- Evaluate and select data collection methods
 - Surveys
 - Conversations
- Identify target audiences for primary data collection

4 Collect Primary Data

- Develop and deploy a survey
 - Create survey questions
 - Keep surveys clear, short, and simple
 - Avoid bias or leading questions
 - Protect respondents' privacy
- Facilitate community conversations
 - Develop approach
 - Plan logistics
 - Conduct conversations

2. Conduct Community Assessment

5 Inform and Engage Staff

- Develop staff engagement approach
- Facilitate staff conversations

6 Identify Themes

- Sort data by category
 - Needs and concerns
 - Aspirations
 - Issues and barriers
 - Solutions
 - Community assets and strengths
- Classify data into themes

Thank you!
